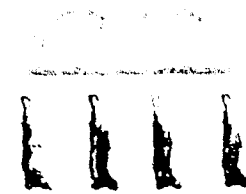


Insights and Implications from Dyson Tracking Study – Wave 5



Presented by
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Though Dyson's suction and power messages are still strong, there has been some decline over the waves; Hoover may be seeing some halo from the attack ad on attributes like 'cyclone tech', 'no bags', and 'looks different'

Top 3 Box

	Dyson				Hoover				Eureka			
	Apr '04	Dec '04	Jul '05	Dec '05	Apr '04	Dec '04	Jul '05	Dec '05	Apr '04	Dec '04	Jul '05	Dec '05
	A %	B %	C %	D %	A %	B %	C %	D %	A %	B %	C %	D %
Makes vacuums that don't lose suction	75 ^{CD}	72	68	68	48 ^{ACD}	35	36	34	39 ^{ACD}	22	26	25
Is a powerful vacuum cleaner	76 ^{CD}	72 ^C	65	49	56 ^D	49	50	44	44 ^{AC}	34	31	38
Cleans well	69 ^{CD}	49 ^C	59	63	52	53	54	50	41	40	38	39
Performs to my high expectations	NA	61 ^C	55	57	NA	44	48	43	NA	30	32	29
Is a successful vacuum cleaner brand	51	50	52	54	73 ^D	71	70	46	51	57	53	56
Is a vacuum that will last a long time	56 ^C	56 ^C	49	52	54	49	55 ^D	47	39	35	36	40
Makes innovative products	73 ^C	72	68	70	37	35	36	34	30	24	25	26
Works differently than others	NA	72 ^C	66	67	NA	22	25	26	NA	13	19 ^A	18
Makes vacuum cleaners that don't clog	66 ^D	68 ^C	63	61	31	30	32	32	23	20	22	24
Is a brand that reinvented the vacuum	64	67 ^C	61	62	32	30	29	30	21	17	18	19
Is easy to use	65 ^{ACD}	64	54	54	66 ^{CD}	59	58	54	55 ^{CD}	57 ^{CD}	45	44
Is a status symbol	49	49	54	55	27	28	24	24	19	21	19	17
Makes attractive vacuum cleaners	56 ^C	51	50	51	39	39	36	37	34 ^C	32 ^C	25	31
Makes vacuums that don't use bags	77	77	75	75	49 ^{AC}	37	41	47 ^A	37	40	36	34
Uses 'cyclone' technology	56	69 ^A	67 ^A	70 ^A	28	24	26	31 ^B	20	21	21	21
Makes vacuums that look different	67	69	65	67	18	19	19	25 ^A	18	15	19	17
Makes vacuum cleaners that are fashionable	NA	NA	54	54	NA	NA	31	32	NA	NA	24	23
Is heavy	27 ^{ACD}	20 ^C	16	20	44 ^{CD}	42 ^C	20	23	31 ^{CD}	27 ^{CD}	14	17
State of the art technology	NA	NA	70	70	NA	NA	36	34	NA	NA	24	28
Cleans better than others	NA	NA	56	60	NA	NA	44 ^A	38	NA	NA	24	27
I'm keen to try latest products	NA	NA	52	57	NA	NA	35	34	NA	NA	25	24
Products are consistently evolving	NA	NA	52	54	NA	NA	38	39	NA	NA	27	27
Easy to manoeuvre	NA	NA	49	51	NA	NA	44	39	NA	NA	33	35
Makes vacuum cleaners for people like me	NA	NA	48	51	NA	NA	50	44	NA	NA	36	33
Takes hassle out of vacuuming	NA	NA	40	43	NA	NA	32	32	NA	NA	20	25
Makes vacuuming more enjoyable	NA	NA	34	37	NA	NA	26	24	NA	NA	17	15

Base: Aware and asked - Dyson Apr '04 (623), Dec '04 (777), July '05 (898), Dec '05 (938); Hoover Apr '04 (380), Dec '04 (346), July '05 (373), Dec '05 (340); Eureka Apr '04 (317), Dec '04 (320), July '05 (341), Dec '05 (293); A/B/C/D = Statistically significant @ 95% within brand

*First wave tested

Notes: For each statement below, please rate these vacuum brands on a scale of 1 to 10, where 10 means "applies completely" and 1 means "does not apply at all." You may use any number between 1 and 10.

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Benefit of "No loss of suction"

	TV				Print					
	TV Avg. '04	July '05		Dec. '05	Print Avg. '04	July '05			Dec. '05	
		'Brain'	'Hand'	'Drawing Board'		'Furniture'	'Living Room'	'Way You Vacuum'	'Carpets'	'Rooms'
		A	B	C		D	E	F	G	H
	%	%	%	%	%	%	%	%	%	%
Cleans	49	42	37	46	51	48	50	52	52	51
Better cleaning	25	21	18	26	26	25	24	24	30	29
Picks up well	11	10	10	10	11	13	12	14	10	11
More efficient cleaning	11	7	7	9	12	7	9	11	13	9
Picks up the first time	6	7	4	5	6	5	7	8	4	6
Doesn't lose power	14	9	6	8	14	6	10	12	7	8
Lasts a long time	12	6	4	6	12	5	7	8	6	6
Won't stop sucking	1	3	2	0	1	2	3	1	0	1
Bag/Filter	17	11	12	17	17	12	12	16	15	18
No clearing out clogs	8	4	4	9	8	5	4	6	5	10
Won't clog	3	3	3	2	3	2	3	8	2	2
Ease of Use	NA	7	6	3	NA	7	8	4	3	5
No Matter how you maneuver	NA	2	1	-	NA	3	3	2	-	-

Base: Brain (600)), Hand (595) Drawing Board (763), Furniture (251), Living Room (269), Way You Vacuum (200), Carpets (297), Rooms (297)
A/B/C, D/E/F/G/H = Statistically significant at 95%

Q1: What is the benefit of no loss of suction when using a Dyson vacuum cleaner?

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Insights and Implications from Dyson Tracking Study – Wave 4



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The functional imagery of the brand comes across clearly to those who saw the advertising

Brand Imagery – Top 3 Box by Dyson Ad Recognizers vs. Non-Recognizers

	Dyson Summary	
	Dyson Ad Recognizer	Dyson Non-Ad Recognizer
	A %	B %
Makes vacuums that don't use bags	79 ^B	69
State of the art technology	76 ^B	61
Makes innovative products	76 ^B	57
Makes vacuums that don't lose suction	74 ^B	59
Uses 'cyclone' technology	76 ^B	62
Makes vacuums that look different	71 ^B	56
Works differently than others	72 ^B	58
Is a powerful vacuum cleaner	71 ^B	58
Makes vacuum cleaners that don't clog	70 ^B	52
Is a brand that reinvented the vacuum	67 ^B	50
Cleans well	63 ^B	52
Cleans better than others	60 ^B	47
Performs to my high expectations	60 ^B	45
Is easy to use	60 ^B	43
I'm keen to try latest products	59 ^B	39
Makes vacuum cleaners that are fashionable	60 ^B	42
Products are consistently evolving	58 ^B	41
Easy to manoeuvre	59 ^B	33
Is a status symbol	56 ^B	48
Is a successful vacuum cleaner brand	56 ^B	43
Makes attractive vacuum cleaners	56 ^B	40
Makes vacuum cleaners for people like me	53 ^B	37
Is a vacuum that will last a long time	54 ^B	38
Takes hassle out of vacuuming	45 ^B	29
Makes vacuuming more enjoyable	38 ^B	24
Is heavy	18 ^B	12

Base: Aware and asked: Dyson Ad Recognizers (513), Dyson Non-Ad Recognizers (341)

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A/B = Statistically significant @ 95% *Dyson owners removed from analysis

Based on Consumer Attitudes Research



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This is a top-down statement below is the true statement about brand on a scale of 1 to 10, where 10 means "applies completely" and 1 means "does not apply at all." You may use any number between 1 and 10.

There is a clear understanding that 'No loss of suction' correlates with a better cleaning product

Benefit of "No loss of suction"

	TV			Print			
	TV Avg. '04	'Brain'	'Hand'	Print Avg. '04	'Furniture'	'Living Room'	'Way You Vacuum'
		A	B		C	D	E
Cleans	49	42	37	51	48	50	52
Better cleaning	25	21	18	26	25	24	24
Picks up well	11	10	10	11	13	12	14
More efficient cleaning	11	7	7	12	7	9	11
Picks up the first time	6	7	4	6	5	7	8
Doesn't lose power	14	9	6	14	6	10	12
Lasts a long time	12	6	4	12	5	7	8
Won't stop sucking	1	3	2	1	2	3	1
Bag/Filter	17	11	12	17	12	12	16
No clearing out clogs	8	4	4	8	5	4	6
Won't clog	3	3	3	3	2	3	8
Ease of Use	NA	7	6	NA	7	8	4
No Matter how you maneuver	NA	2	1	NA	3	3	2

Base: Brain (600), Hand (595), Furniture (251), Living Room (269), Way You Vacuum (200)
A/B, C/D/E Statistically significant at 95%

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